



Information Memorandum

Oregon Department of Human Services

Originating Cluster:

Seniors and People with Disabilities

Authorized by: Catherine A. Cooper, Deputy
Assistant Director
Signature

IM Number: SPD-IM-04-008

Date: January 23, 2004

Subject: Oregon ACCESS (version 19.71) Recent Updates

Applies to (check all that apply):

- | | |
|--|--|
| <input checked="" type="checkbox"/> All DHS employees | <input type="checkbox"/> County DD Program Managers |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> County Mental Health Directors |
| <input type="checkbox"/> Children Adults and Families | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Community Human Services | <input checked="" type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> Other (please specify): _____ | |

Message: Oregon ACCESS (Release 19.71) updated some case records related to the Cost of Living Adjustments (COLA) for Social Security Income. Oregon ACCESS synchronized other income types with the Client Maintenance records during the COLA update. Oregon ACCESS updated OSIP Standards and Community Spouse Allowance amounts used for calculations. Oregon ACCESS has reset the Pay-In calculations to reflect the COLA updates for 2004. Oregon ACCESS has updated the Administrative Exam information found on the Medical Tab.

See Attached for more information on Oregon ACCESS changes.

If you have any questions about this information, contact:

Contact(s):	Dawn Andersson		
Phone:	503-945-5815	Fax:	503-947-5357
E-mail:	Dawn.C.Andersson@state.or.us		

Oregon ACCESS Annual Updates

COLA Overview

Annually our systems are updated with various Cost of Living Adjustments that may affect income and standards. Any person with an income type that is administered by Social Security Administration should receive the 2004 COLA increase of 2.1%.

The Social Security Administration gives information to the Department of Human Services to load into BENDEX and SDX. This information is displayed on the BEIN screen. The Client Maintenance System (CMS) and Food Stamp Management Information System (FSMIS) each has a special job that updates their records using the information found in BENDEX and SDX. Oregon ACCESS has a special job that runs using information found on CMS and FSMIS to update their case records. The end of this document will give more detailed information about the COLA process.

On 12/27/2004 a mass file update ran using the CM end-of-month (EOM) records. This update synchronized all the Need/Resources that match between CM and OA (for example; SSI, SSB, SSDI, VET, OTH, PEN, ACC, LDS and SE). This process of synchronizing the two systems started with the 12/2002 update. SPD discovered a significant number of discrepancies between CMS and Oregon ACCESS data when planning for the budget cut changes in early 2003. Oregon ACCESS began the synchronization processing that is also used as part of the COLA update at that time.

For example:

Oregon ACCESS application module recorded \$650.00 VET.

PCMS on Mainframe recorded \$750.00 VET.

Oregon ACCESS was changed to \$750 VET after 12/27/2003.

OSIP Standard Update

The OSIP Standards and Community Spouse Allowance were updated on 01/01/2004 due to the COLA. Oregon ACCESS updated the OSIP Standard used in the calculations that occur in the application module and print on specific forms. The forms that reflect the update are as follows: SPD 450 Liability Worksheet, Pay-In Calculation Form and RA 3401 Resource Assessment

OSIP COLA Increase Update on Oregon ACCESS

Group	One Person	Two or More
AD/OAA	565.70	846.00
AB	590.70	871.00

The Resource Assessment had the community spouse monthly needs allowances updated as follows:

Minimum Resource \$18,552.00

Maximum Resource \$92,760.00

Maximum Monthly Need Allowance \$2319.00

Liability/Pay-In Update

The updates to Social Security Administration income types and OSIP standard on Oregon ACCESS may affect the amount of liability a client may have for Services. On 01/12/2004 Oregon ACCESS reset the Pay-In calculation to update using the new OSIP standard and COLA increases. The Pay-In information can be found in the application module on the Medical Cost Tab. This updated the information being pulled to the Pay-In form and SPD 450 Liability Worksheet.

The field will still need to review their cases that have a Pay-In to make sure all of the related deductions found on the Medical Cost Tab or Other Needs Tab are still accurate in 2004. If a worker forgets to remove the various deductions from these two tabs after they are no longer valid the Pay-In Calculation will be wrong on Oregon ACCESS. The LDS/Pay-In/Spend Down Report found on Oregon ACCESS under the reports section can assist workers in checking cases for potential problems with LDS or Pay-In amounts.

The screen prints on the following page show where in Oregon ACCESS the various tabs mentioned above are located.

Oregon Access [Office : North Portland Disability Services Office (2617) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for HAVA BALL / Case Nmbr: FT09389 (Case Branch : North Portland Disability Services Office)

Health Ins. Med. Services **Medical Cost** Physical Medical Trans

Medical Expense List

Description	Monthly Amt	Verified

Medical Expense Detail

Type: Monthly Amt:

Medical Expense Name: Spend Down Deduction: ☐

Address: Allowable Med. Deduction: ☐

Line 2: Adjusted # in Household

City State ZIP: One ☐

Tele Nbr: Two or More ☐

Verified: ☐

Person(s) Responsible

Client Name	Involvement	
BALL, HAVA		<input type="button" value="Add"/>
		<input type="button" value="Remove"/>

The type of medical expense.

Oregon Access [Office : North Portland Disability Services Office (2617) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for HAVA BALL / Case Nmbr: FT09389 (Case Branch : North Portland Disability Services Office)

Waiv/OPI Non Waiv Supply/ENCC **Other Needs** Nutr Risk/ADL OAA Service Referral

Other Needs List

Description	Monthly Amt	Verified

Other Need Detail

Type: Monthly Amt: [437 Details](#)

Other Need Name:

Address:

Line 2:

City State ZIP:

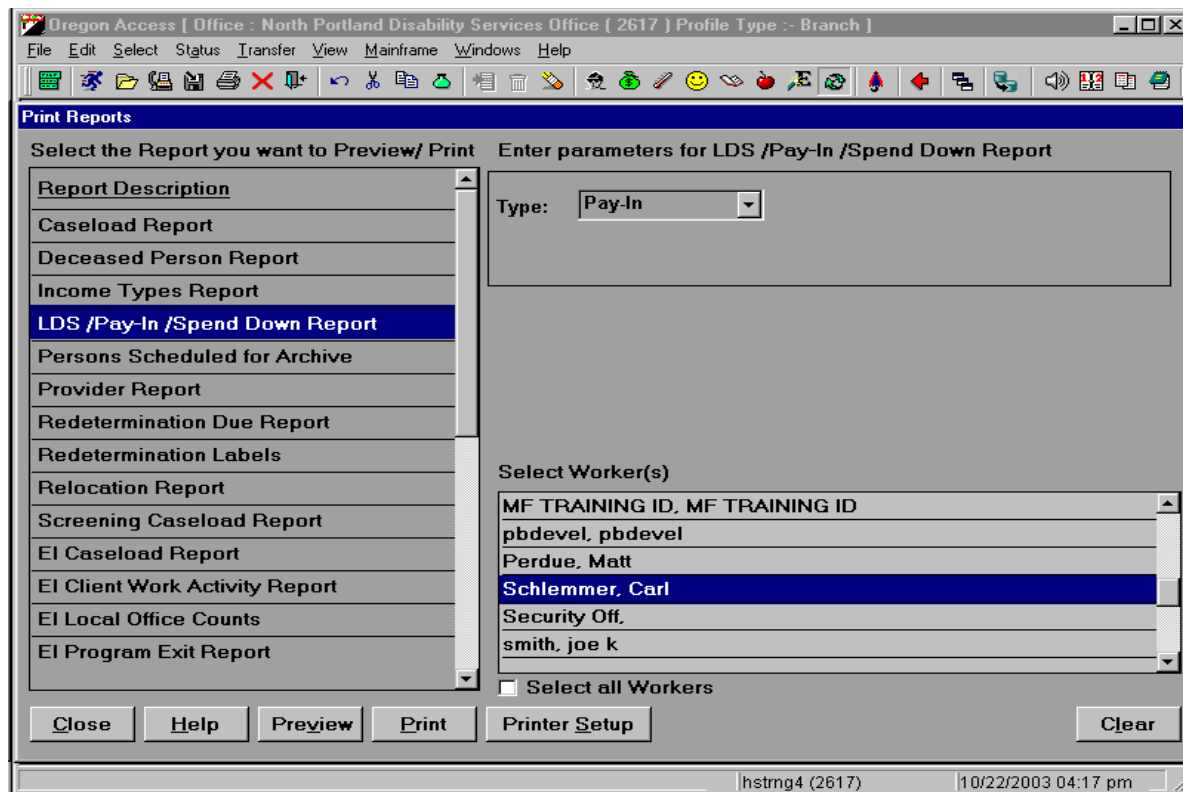
Tele Nbr:

Verified: ☐

Person with other need

Client Name:

The type of medical expense.



Administrative Examinations Update

Oregon ACCESS has updated the Administrative Exam information found on the Medical Tab. The 99080 Procedure Code now shows three times on the drop down for the Examination field. The 99080 Mental Residual Fun Cap (Mental Residual Function Capacity Report) will now print the OMAP 729 E when selected. The 99080 Physical Resid Fun Cap (Physical Residual Function Capacity Report) will now print the OMAP 729 F when selected. The 99080 Rating of Impairments will now print the OMAP 729 G when selected. Any of the 99080 selections will allow a 729 to print with the correct report title and a payment amount listed.

The obsolete Administrative Exam codes (ADM 07 for example) are still listed as options but may not be selected. They are listed to keep the history of exams prior to the change to Procedure Code from Administrative Exam numbers.

The screen print on the following page will show where in Oregon ACCESS the Administrative Exam information is located.

Oregon Access | Office : North Portland Disability Services Office (2617) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for SOFT BALL / Case Nmr: FT09330 (Case Branch : North Portland Disability Services Office)

Health Ins. Med. Services Medical Cost Physical Medical Trans

Medical Services List

Person	Service Class	Verified

Medical Detail

Provider

Provider Search Prov ID: Class: Name: Address: Line 2: City State ZIP: Tele Nmr: () - Client Complaints: Admin Exam: ☒ Examination: Exam Date: 00/00/0000

Requested PCP : ☐
Current Patient : ☐
Verified: ☐

Person Receiving Medical Service

Name: BALL , SOFT

COLA Update More Information

Social Security Income information is found on the BEIN screen. The BEIN screen displays the BENDEX (SSB/SSD) and SDX (SSI). The BENDEX only has one amount that is used to update the CMS (Medicaid) and FSMIS (Food Stamps). The SDX has an entitlement amount (E-Amt). The entitlement amount shows the total due to a claimant, which is used by Medicaid. SDX also has a payment amount (P-Amt). The payment amount shows the actual amount paid out after any over payments and/or garnishments, which is used by FSMIS. The SDX files were updated on 11/28/2003 and BENDEX files were updated on 12/26/2003.

1 - DHS.HEP (DHRMF)

File Edit Transfer Fonts Options Macro View Window Help

PA1 PA2 PA3 ENT CLR

BEIN SSA Information 01/15/2004 11:27 am

Fast Path EB Access Key

SSN: 000-00-0000

** B E N D E X D a t a ** Prev Stat: Prev Resp:

Surname	Given	MI	DOB	PR	Sex	Inq-St	Inq-Dt	Resp-Dt	Comm-Code
CAN									

SSB Information SMIB Information HIB Information Last

Amt	P-St	E-Dt	P-Amt	Payer	E-Dt	T-Dt	P-Amt	Payer	E-Dt	T-Dt	Chng

BENDEX-Disab Date Gar OVP Pass Plan Curr Rec Ind

** S D X D a t a ** Rec U F L M R Last

Surname	Given	MI	P-St	E-Amt	P-Amt	E-Dt	Typ	I E A S I	Chg-Dt

SDX-Disab Date OVP Med Elig Med Test Alien Spn Stt

EFT-DFI Acct EFT-Bnk Acct Alien SSI Elg

Sys	Case-Id	Agcy	Sys	Case-Id	Agcy	Sys	Case-Id	Agcy	Sys	Case-Id	Agcy

SSN NOT FOUND ON BENDEX MASTER = 0000000000

F1=Help F3=Exit F6=Fast Path F15=Manual F21=BEIN1 F22=BEIN3 F23=TPQY

1 Sess-1 170.104.128.11 HTCP3966 4/7

Start Novell-deliv... GroupWise... Oregon Acc... 1 - DHS.HE... 1 - DHS... Corel Word... 11:27 AM

The CMS COLA run was completed on 12/27/2003. Oregon ACCESS ran a special job to update their records the same day to match the CMS records. This run updated the Gross Amt field on the Income Tab located in the Financial Section of an application on Oregon ACCESS. The FSMIS COLA run was completed on 12/31/2003. Oregon ACCESS ran a special job to update their records to match the FSMIS records. The updated case records on Oregon ACCESS were available to the field on 01/20/2004. See the attached GroupWise sent out by Jennifer Dejong on 12/23/2003 for information on the CM and FSMIS update process.

If a person on Oregon ACCESS did not have an active record on CMS or FSMIS then no update occurred related to the Social Security Administrations COLA. Additionally, for Food Stamps Oregon ACCESS updated the first person on a record and any other persons who were marked HH (Head of Household) or APP (Applying) for Food Stamps on the Case Overview Tab.

This screen print shows where in the application module on Oregon ACCESS to find the updated information. The financial section on the income tab has two fields for Gross Amt and Net Amt that can be found on the right-hand side of the

screen under the section called Monthly. The Gross Amt is filled based on CMS records and Net Amt is filled based on the FSMIS records.

Oregon Access [Office : North Portland Disability Services Office (2617) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for HAVA BALL / Case Nmb: FT09389 (Case Branch : North Portland Disability Services Office)

☐ Incm / Empl ☐ Resources ☐ Property ☐ Prop Trans ☐ Shelt Cost ☐ Funeral ☐ Life/Bur Ins. ☐ EPD

Income Employment

Income List

	Person	Income Type	Monthly Gross	Verified
1	BALL, HAVA	Supplemental Security Income	654.00	No

Income Detail

Type: Supplemental Security Income

Description:

Source

Name: Social Security Administration

Address:

Line 2:

City State ZIP:

Tele Nmb: () - Ext:

Monthly

Gross Amt: 654.00 Net Amt: 476.00

Claim Nmb: 555-66-9970A

Is Income Exempt from Food Stamp Calc: ☐

Applied For: ☐ DDS

Attorney

Name:

OHP Only

1st Prior month's income: .00 2nd Prior month's income: .00

Verified: ☒

Client Name: BALL, HAVA

"Is the information entered on the screen complete and verified?"

hstrng4 (2617) 01/13/2004 05:14 pm



STATE OF OREGON

MEMORANDUM

DATE: December 23, 2004
TO: Children, Adults and Families
FROM: Program Systems Support
SUBJECT: ***AR: Annual Autoruns for SSA Cost-of-Living Adjustment (COLA)***

On January 1, 2004, the following federal benefits will receive an annual cost of living adjustment (COLA) increase: Social Security Benefits (SSB), Supplemental Security Income (SSI), Veterans' pension and compensation benefits (VET), and Railroad Retirement Benefits (RRB). Mainframe system updates and reports have been scheduled to address the effect of the SSA COLA on open CM and FS cases.

CM and FS System Autoruns:

A mass file change will run at December 2003 end-of-month (EOM) to update the SSB and SSI amounts for OSIP, TANF, Food Stamps, MAA, MAF and REF cases, effective January 1, 2004. The SSB and SSI amounts will be updated by the new amount found on an annual COLA update tape from SSA, or, if not found on the tape, by the annual COLA percentage increase. The COLA increase for 2004 is 2.1%.

CM Reports with Required Action:

- **WCM9204R-A "Annual GA/OSIP Standards Increase - Cases Going NA"**

Available now on ViewDirect (formerly called Mobius). Lists OSIP cases that will go into NA (no action) status effective 1/1/04 due to the increase in Social Security Benefits. Cases that go NA will not issue a medical ID. Review the report to determine whether NA status is appropriate and make corrections if necessary.

- **WCM9205R-A “Annual OSIP/GA Standards Increase - Cases with Other N/R Codes”**

Available now on ViewDirect. Lists CM cases that have a need/resource code of RRB, VET, SHK, VOL, TAA or SE. No automated update is completed to increase these types of benefits. Use this list to identify affected cases, review the codes for appropriateness and update the amounts. Clients should be reporting RRB and VET benefit increases. SHK, VOL, SE, and TAA are included as they may be affected by the annual COLA change.

- **WCM1015R-A “No BENDEX RECORD - SSB Increased by COLA Percent”**

Available on ViewDirect the first week of January. Lists CM cases in which the SSB was updated by the COLA percentage increase during the December EOM run because no match was found on the SSA COLA tape for the client. Check the BEIN screen for these CM cases to determine whether the updated amount on CM is correct. If there is no current information on the BEIN screen for the client, process a TPQY request via the WQY1 screen to check the client information (name, SSN, DOB, benefit amounts, claim number).

CM Reports of Notices Sent:

- **WCM9206R-A “ P2 CASES RECEIVING 080 NOTICES -TANF RELATED MEDICAL ENDS”**

Available now on ViewDirect. Lists P2 CM cases in which the COLA increase caused the MAA or MAF medical to end.

- **WCM9308R-A “2/82 CASES RECEIVING 070 NOTICES-TANF CHANGE DUE TO SSB INCREASE”**

Available now on ViewDirect. Lists 2/82 CM cases in which the COLA increase caused the TANF grant to be reduced.

- **WCM9308R-B “2/82 CASES RECEIVING 080 NOTICES-TANF RELATED MEDICAL ENDS”**

Available now on ViewDirect. Lists 2/82 CM cases in which the COLA increase caused the MAA medical to end.

BE Reports with Required Action:

- **WBE0235R-A “SSA COLA Garnishments - Food Stamp OP/SU Cases”**
Available on ViewDirect the end of this month. Lists FS cases with SSA benefit amounts and the garnished amount.
- **WBE0235R-B “SSA COLA Garnishments - Client Maintenance CP/VP/NA Cases”**
Available on ViewDirect the end of this month. Lists CM cases with SSA benefit amounts and the garnished amount.

FS Reports with Required Action:

- **WFS3932R-F “No BENDEX RECORD - SSB, SSD, SSI Increased by COLA Percent”**
Available on ViewDirect in mid-January. Lists FS cases in which the SSB/SSD/SSI benefits were updated by the COLA percentage increase because no match was found on the SSA COLA tape for the client. Check the BEIN screen for these FS cases to determine whether the updated amount on FSMIS is correct. If there is no current information on the BEIN screen for the client, process a TPQY request via the WQY1 screen to check the client information (name, SSN, DOB, benefit amounts, claim number).
- **WFS9030R-A “FSMIS Cases with TAA and/or MNL HH Type in OP/SU Status”**
Available on ViewDirect in mid-January. Lists FS cases with a TAA or MNL household type on the FS case. FS cases with the TAA or MNL household type do not update the GNT amount. Review the accuracy of the GNT amount coded.

Other System Report with Required Action:

- **SJM4100R-A “Cases with LDS Need Code”**

Available on ViewDirect in January. Lists cases that have an LDS N/R code. Cases with this code may have been affected by the annual COLA change. Review the cases to determine the appropriateness of the N/R codes and amounts.

Special CBC Payment System Note:

The January 2004 CBC Payment System records (512s) will be updated the weekend of December 27th to reflect the increases shown on the CMS case after the CMS COLA increase. An updated copy of the 512 document will be mailed to each person on the CBC record (e.g. client, provider and reliable resource/other person or legal person, if listed). Any changes made to the CMS record after December 27th will require that the worker "touch" the January 512 to draw in the updated CMS figures.

Resource List:

For questions about the effect of the SSA COLA increase on eligibility or mainframe systems issues, contact the following:

Food Stamp Program	Eliza Devlin	503 945-6092
	Anne Hilgers	503 945-6105
	Lydia Dale	503 945-5826
Medical Programs	Jeff Miller (SPD)	503 945-6410
	Roger Staples (CAF)	503 945-6072
	Joyce Clarkson (CAF)	503 945-6106
TANF Program	Jeff Stell	503 945-6542
Mainframe (CM, FS)	DHS Help Desk	503 945-5623
ViewDirect (Mobius)	Dale Marande	503 945-6476